

United States Jobs Expertini®

Banking Specialist IV

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Company: Amerant Bank

Location: Boca Raton

Category: other-general

As a Banking Specialist IV, you help create the energy and excitement around Amerant Bank products, providing the right solutions and getting products into customers' hands. You understand that Amerant Bank is dedicated to delivering a customer experience that's unlike any other. It starts with you discovering customers' needs and with the support of your team members, you match those needs with the right products. Every day is an opportunity for you to turn another Amerant Bank customer into a loyal customer. Purpose of role is to provide teller and platform-based transactions, manage lobby activity and support mobile, online banking and digital solutions. In addition, provide education and knowledge of our consumer and small business products to existing and new customers.

OPERATIONAL EXCELLENCE:

Process all manner of financial transaction requests including but not limited to deposits, withdrawals, check cashing, issuance of cashiers' checks.

Research and resolve issues related to end of day banking center balancing.

May be responsible for functions related to the day-to-day operation of the ATM, cash recycler, drive thru and night drop.

Ability to open new accounts and perform maintenance transactions on the Bank's platform system including debit card issuance and ongoing maintenance as well as completion of Know Your Customer requirements. Execute all operation responsibilities relative to opening and maintain all products and services.

Review customers account activity to ensure compliance with Bank Secrecy Act.

May be responsible for the daily review of overdraft, uncollected and significant balance change reports.

Ability to originate new credit requests and respond to loan related inquiries.

Follow Bank policies and procedures, as well as legal and regulatory requirements, including security and audit procedures.

Adhere to all policies and procedures per Retail Banking's operating manuals, employee handbook and all other that apply to the position functions. Ensure all regulatory requirements as well as security and audit procedures are adhered to always.

Responsible for ensuring individual acts do not lead to Bank operating losses as well as escalating potential concerns that could lead to Bank loss to appropriate supervisor.

Identify, evaluate, monitor and make any recommendation deemed necessary to the Risk Management Committee in order to assess, reduce, eliminate or control any current or prospective risks to earnings or capital arising from violations of, or nonconformance with, laws, rules regulations, prescribed practices, internal policies and procedures or ethical standards.

Ensure preventive measures are carried out to fully comply with current rules, regulations and internal policies relating to risks pertaining to BSA, USA Patriot Act, OFAC and other AML related issues.

CUSTOMER SERVICE:

Act as a customer advocate to ensure we meet the needs of our customers and prospects with the intent of enhancing customer retention and engagement.

Resolve customer problems and follow up to ensure customer's expectations are met.

Deliver customer experience for all segments to ensure quality customer experience every day every time.

Provide quality customer service to all current and prospective customers as measured by Bank service standards.

BUSINESS DEVELOPMENT:

This position requires consistently meeting or exceeding sales goals as defined by management.

Achieve out bound conversation expectations as defined by management.

Responsible for acquiring, retaining and expanding new and existing customer relationships by providing a positive new account experience, profiling, assessing customer needs, and recommending and selling appropriate banking products and services.

Take an active role in educating our customers on other banking channels to meet their needs.

Responsible for learning and maintaining knowledge of Bank's products and services.

Participate in business development activities in support of the banking center market development activities as requested.

Actively participate in community organizations to promote the Bank brand as well as support business development initiatives.

Refer prospects and clients to other lines of business according to determined segmentation (AMTI, Commercial Banking, etc.)

BANK TRANSFORMATION:

Adhere to expectations defined for banking centers as defined by management.

Responsible for adhering to no personal space guidelines and that the banking center is clean and free of clutter.

For Transformed Banking Centers: Responsible and able to utilize all elements within a transformed banking center: Welcoming Zone, Comfort Zone, Discovery Zone, Advisor Connect, Service Spots, Teller Tower, etc.

Learn and encourage usage of all digital components in the banking center by banking center guests.

May be the Digital Advocate for the banking centers. Responsibilities include being an expert on the Bank's Online Banking (personal and business) and Mobile Banking channels to be able to assist customers and promote their sale and usage. Responsible for educating other team members on digital channels.

Adhere to and participate in lobby management standards including acting in the Greeter role. Greet customers/prospects in the lobby in accordance with banking center defined standards.

Adhered to defined career wear standards.

OTHER:

Live the Bank values every day.

Complete mandatory training and required responsibilities to have knowledge of complete lines of products and services.

May have approval authority.

May be asked to train and aid less experience banking center team members.

Cooperates with superiors, peers to accomplish team and Bank goals.

Ability to work in different assigned banking centers within the region.

Other duties as required.

Minimum Work Experience Requirements:

Banking Specialist IV requires over 5 years' experience in Bank sales / service environment or equivalent experience to include sales results.

Minimum Education Requirement:

High School or GED required. AA or Bachelor's Degree preferred. English required, and certain markets may require second language skills.

Functional Skills & Knowledge Requirements:

Must be a team player, can work under pressure, have a professional image and be able to resolve problems and conflicts. Must be able to prioritize work and effectively manage time. Must possess basic business communications skills such as advanced writing, listening and have

basic office and mathematics skills, and customer service skills. Possession of professional skills such as report writing, basic statistics, effective presentation skills and creative skills are required. Must possess sales and negotiation skills.

*Applicant must be NMLS registered and provide the company with their NMLS number or be willing to register in NMLS upon accepting an employment offer. Additionally, FBI Criminal Background and credit checks must be successfully passed within the first 30 days of employment, or 30 days from the date of the upload (whichever occurs first).

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